

Travel Trends



UNITED STATES



This profile reflects a pre-Covid marketplace and reviews trend data for the US market from 2007 to 2019. The series begins in 2007 to track the recovery from the last recession up to 2019, the last year of complete overseas data.

As an industry, tourism has experienced cycles of downturn and recovery before. While the challenge has never been of this magnitude, the data highlights its resilience and capacity for growth based on past economic shocks.

Understanding travel behaviour in pre-pandemic times will help drive recovery post-Covid.

This travel profile looks at:

1. The trend in American tourist numbers and revenue (tourist figures include all reasons for travel: holidaymakers, visiting friends and relatives, business tourists and others combined).
2. US holidaymakers, as an important subset of tourists, and their characteristics and behaviour in pre-Covid times.

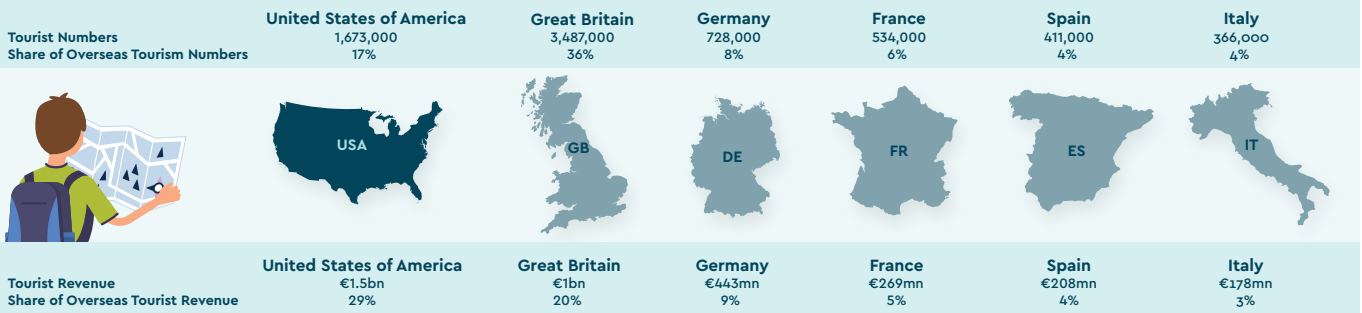


Tourism Numbers and Revenue Trends

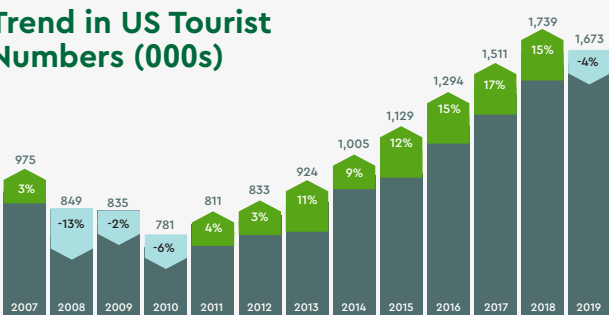
With strong cultural and ancestral links, the US has and will continue to be an important market for Ireland. After the decline in 2008, it took until 2014 for tourist numbers to recover to 2007 levels. However from 2013 onwards Ireland experienced exceptional growth from the US up until 2019. 2019 saw the first decline in numbers since 2010.

An important market for tourism revenue, the US surpassed Britain as the overseas market generating the largest revenue for Ireland in 2015, and remained so. Such strong revenue is attributable to increasing US tourist numbers (a high proportion of which are holidaymakers) and longer than average stay.

US Share of Overseas Tourists and Revenue (2019)



Trend in US Tourist Numbers (000s)



Trend in US Tourist Revenue (€mn)



While the US is not Ireland's primary source of tourists (GB is Ireland's single largest source market), it is Ireland's most important single market in terms of revenue generation.

US Tourists

Stay one or more nights (i.e. excluding same day travellers) and can be classified into:



US HOLIDAYMAKER TRENDS

Motivation to Travel¹ (Pre-Covid)

On average, Americans receive a lower number of statutory holidays compared to Europeans. Consequently, travelling beyond North America requires confidence that the trip is 'worth' the effort, expense, and usage of precious holiday days.

Iconic historic attractions differentiate Ireland from home and are an important driver of travel for this market. American holidaymakers in particular want to know that there is enough variety and things of interest to do for the whole holiday and that they are all easily accessible (easy to get to and get around).

Post-Covid Drivers of Destination Choice

Research by Tourism Ireland² in Ireland's key source markets highlights that while Covid safety assurance comes into play for destination choice, **relaxation, variety of attractions and things to do, quality time with loved ones and value for money** are just as, if not more influential when choosing where to go on a short break or holiday.

Repeat Visitors



More than eight in ten (81%) US holidaymakers are first time visitors to Ireland.

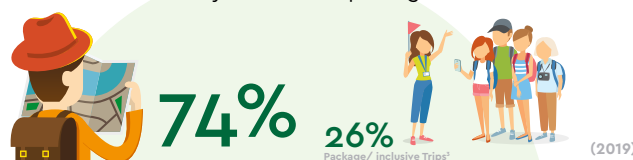
As a long-haul market the rate of repeat visitors from the US (19%) is unsurprisingly lower than other key markets.

(2019)

Travel Arrangements

Nearly three quarters of US holidaymakers (74%) travel independently to Ireland.

The proportion of US holidaymakers travelling on a package tour has declined over time (33% in 2007). They are however the market most likely to avail of a package tour.

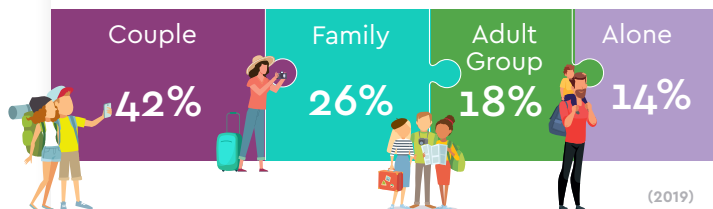


(2019)

Holiday Party Type

Two in five (42%) US holidaymakers travel to Ireland as part of a couple.

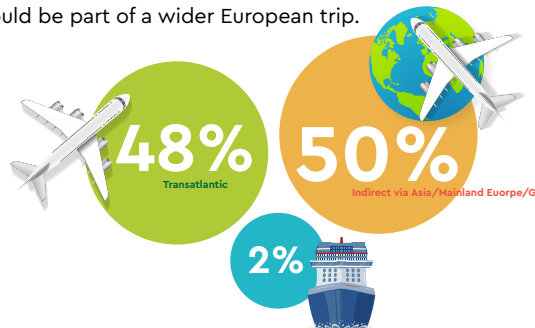
Since 2007 there has been an increase in the proportion of holidaymakers travelling as part of a family group (20% in 2007), with a decline in holidaymakers travelling alone (19% in 2007).



(2019)

Travel Routes

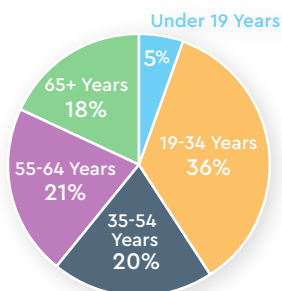
US holidaymakers travel to Ireland by air via a number of different routes. Half arrived via GB or Mainland Europe, which could be part of a wider European trip.



(2019)

Six in ten holidaymakers (61%) are under 55, highlighting the younger profile of pre-Covid US holidaymakers.

Holidaymaker Age



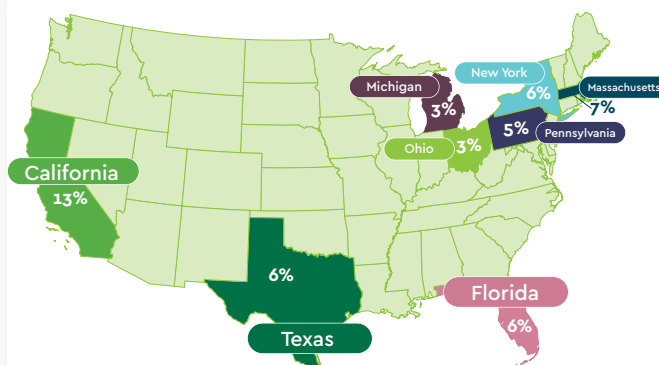
Length of Stay

1 - 3 Nights	20%
1 - 5 Nights	43%
1 - 8 Nights	76%
9 or more Nights	24%

Over half of US holidaymakers stay in Ireland for over 5 nights (57%); a quarter (24%) staying 9 nights or longer.

(2019)

Where Holidaymakers Are From



Half (49%) of American holidaymakers reside across eight states.

(2019)

Source: Fáilte Ireland Survey of Overseas Travellers (2007-2019)

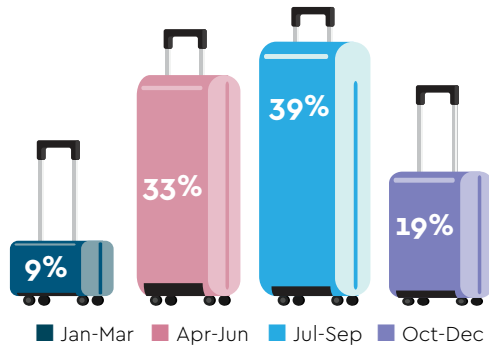
1. Fáilte Ireland Consumer Testing (Innovation Screener (2017)

2. Tourism Ireland Covid Research (June 2021)

3. The fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance

US HOLIDAYMAKER TRENDS

When Holidaymakers Travel



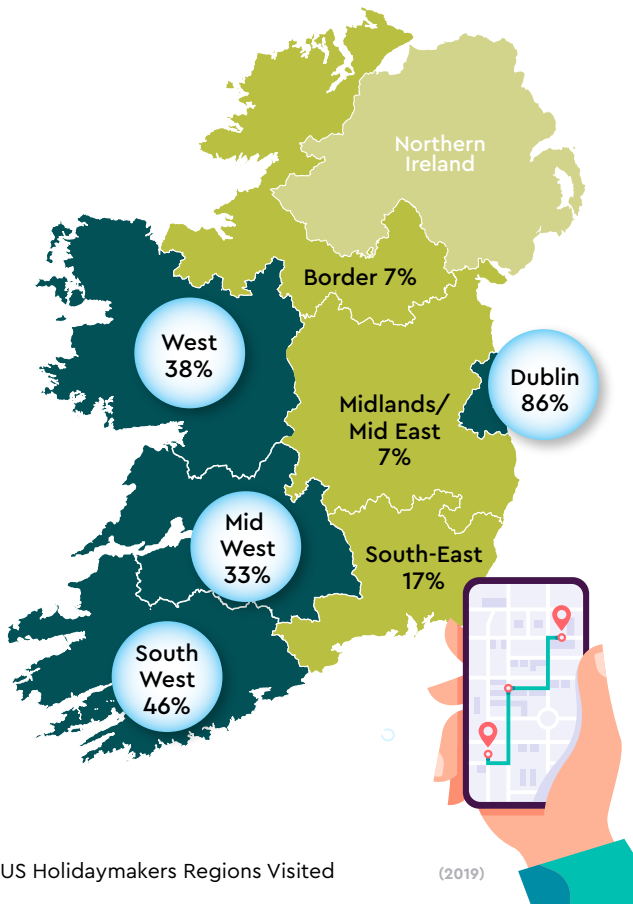
■ Jan-Mar ■ Apr-Jun ■ Jul-Sep ■ Oct-Dec

(2019)



Where Holidaymakers Visit

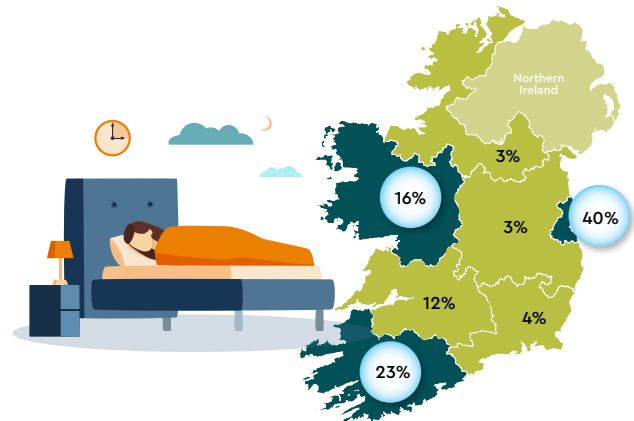
Dublin is a must-see destination for nearly nine out of ten (86%) US holidaymakers and a natural stop for many on arrival or departure. The South-West (46%), the West (38%) and Mid-West (33%) are also popular destinations.



US Holidaymakers Regions Visited

(2019)

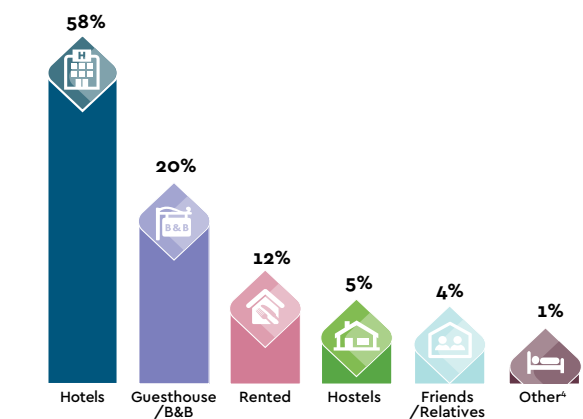
Where Holidaymakers Stay Overnight



US Holidaymaker Nights Spent in Regions

(2019)

Holiday – Accommodation Nights

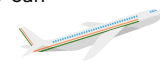


US Holidaymaker Nights spent by Accommodation Type

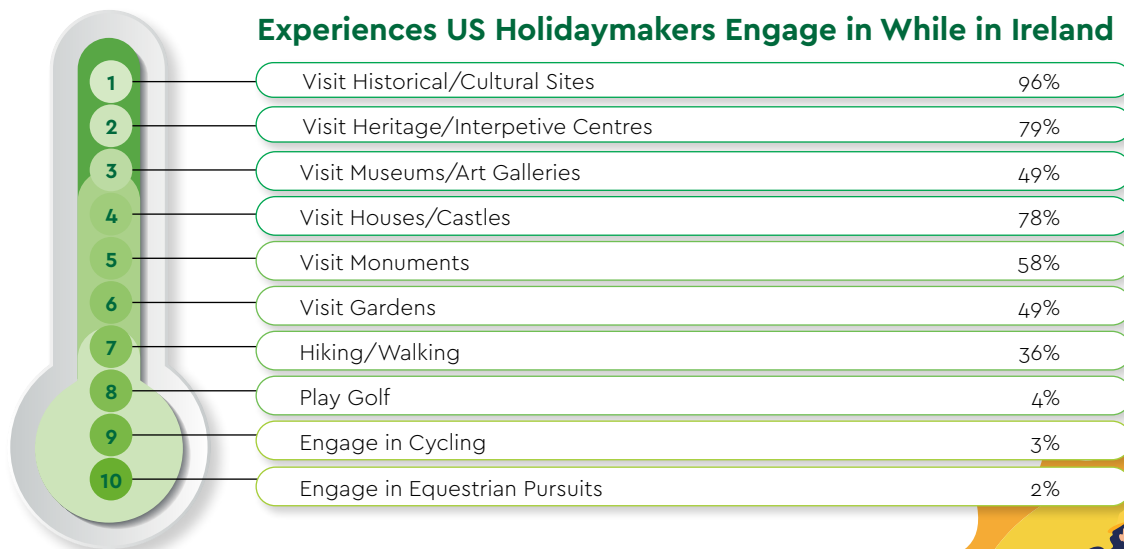
(2019)

THINGS TO SEE AND DO ON HOLIDAY (PRE-COVID)

- American holidaymakers like lots of variety in their holiday itinerary, as they try to get the most out of their time. They prefer experiences that are 'bite sized', so they can explore a range of experiences and see all there is to see.
- Iconic historic attractions differentiate Ireland and are an important driver of travel for this market, as it's not something they can experience at home.
- Activity is generally of an easy nature as they explore and engage with landscape and historical sites.
- Walking/hiking is one activity that has increased in popularity over the years, more than twice as many US holidaymakers are walking as part of their holiday in 2019 (36%) than did in 2007 (14%).



Experiences US Holidaymakers Engage in While in Ireland



Excellent Experience Drives New Business

Considering the limited holiday allowance afforded to most Americans, and the relatively long length of stay in Ireland, American holidaymakers invest a large proportion, if not all of their holiday allowance to come here.

Importance of Holidaymaker Recommendations and Online Presence⁵



Consumer Journey

Awareness

Consideration

Book & Plan

In Destination

Post-Holiday Sharing

When deciding on where to holiday US holidaymakers rely equally on recommendations from both friends and family as well as the Internet.

48% are influenced by family and friends, while 46% use the Internet as a valued source of motivational information when choosing a holiday destination.

74% American holidaymakers use the Internet and 36% seek further recommendations from family and friends when planning their holiday.

How To Ensure The Best Possible Experience?

- A touring holiday visiting many locations allows Americans to see as much of Ireland as possible – are there opportunities to help them to join the dots between stops, with hidden gem attractions, lunch/coffee options or scenic spots to just catch their breath?
- The history and heritage of Ireland interests this market. Colourful stories and tales of local characters will get a welcome reception.
- Opportunities to get active as a way to enjoy the scenery appeal to Americans.
- Walking is a key activity for US holidaymakers and growing in popularity.

How to take advantage of Market Opportunities?

1. As a long-haul market ensure potential holidaymakers get a real sense of what to expect before they arrive through a strong digital presence.
2. Position your tourism business alongside all the other great things to see and do in your area, and make your destination 'worth' the visit.
3. US holidaymakers who enjoyed their time in Ireland can become an extension of Ireland's salesforce endorsing Ireland to friends and family on returning home.

